

County of San Diego  
Revised: April 9, 2001  
Reviewed: Spring 2003

**RECORDABLE DOCUMENTS SPECIALIST I**  
**RECORDABLE DOCUMENTS SPECIALIST II**  
**RECORDABLE DOCUMENTS SPECIALIST III**

**Class No. 002917**  
**Class No. 002918**  
**Class No. 002919**

**DEFINITION:**

To perform detailed research and examination of legal documents for conformity to the recording and indexing requirements of federal, state, city and county government codes and ordinances; to perform detailed abstraction and indexing work according to law in order to prepare an index of official records; and to perform related work as required.

**DISTINGUISHING CHARACTERISTICS:**

Recordable Documents Specialist is a legal technician class series allocated only to the Office of the Assessor/Recorder/County Clerk, Recording Division. Recordable Documents Specialists perform paralegal level work requiring substantial knowledge of special aspects of law related to receiving, reviewing, and making determinations on the legal recordability of documents which establish a public record of ownership of real property within the county and the encumbrances (loans and mortgages on real property), as well as qualifying transactions in personal property, and the recording and indexing of these and a wide variety of legal documents affecting real property parcel, property tax information, etc. County Recorders are required by law to examine, reject or record all documents that are presented for recording the same day, and prepare an official records index of recorded documents within two business days regardless of volume. Recordable Documents Specialists work within this time frame and are subject to strict legal criteria governing recording determinations, indexing operations and quality review standards.

Recordable Documents Specialist I: This is the entry-level class in the series. Under immediate supervision, incumbents assist Specialist II and III levels with document processing, recording or indexing work. As incumbents learn the work, they are expected to work with greater independence, speed and accuracy on documents of increasing complexity while meeting office and legal time frames.

Recordable Documents Specialist II: This is the journey-level class in the class series. Under general supervision incumbents independently research, record and index legal documents. This class is responsible for providing the public with authoritative assistance on a wide range of documents (over 1,000) pertaining to the acceptability of the legal documents submitted for recording as public records. Incumbents in this class may also act as a lead worker providing technical guidance and training to others in the process of indexing documents.

Recordable Documents Specialist III: This is the supervising and highest class in the series. Under general supervision, incumbents are responsible for training, supervising and evaluating the work of Recordable Documents Specialist staff, and for handling the most difficult document research, evaluation and document processing cases, including the more difficult public contact situations. Incumbents in this class report to an Assistant Division Chief, Assessor/Recorder/County Clerk.

## **EXAMPLES OF DUTIES:**

**Recording Duties:** Researches, interprets and indexes a wide variety of government codes, regulations and ordinances related to the legal recording of all manner of legal documents relating to real and personal property with speed and accuracy; accepts or rejects documents for recording; communicates with the public including attorneys, realtors and title insurers effectively, orally and in writing; determines document type; determines documentary transfer taxes and collects proper taxes and fees; examines individual documents to ensure each contain the legal requirements to record; detects discrepancies in documents; verifies parcel numbers, transfer tax and taxes prior to endorsement of documents; determines whether the document presented is an original or certified copy authorized for recording; operates automated recording system to endorse original documents, conformed copies, and Preliminary Change of Ownership forms with pertinent recording information; collects and collates documents by recording number; delivers collated documents to micrographic department at regular intervals for imaging preparation; uses computerized system to generate lien notices and correspondence to return unrecordable documents; provides customer service by phone, mail, through title companies, attorney services and directly at the counter; sorts and distributes legal documents received by mail pertaining to the Recording Division and other divisions; performs cash handling and balancing of drawers on a daily basis; determines which documents fall into the "time sensitive" category and ensures they are processed in a timely manner; provides accurate information to the public as to the requirements and fees needed to record their documents; directs the public to the proper agency to help with their legal questions.

**Indexing Duties:** Scans and abstracts with speed and accuracy pertinent real and personal property information from a wide variety of legal source documents including, but not limited to, deeds, decrees of distribution, court orders, contracts, vital records (birth, death and marriage certificates) and business documents for proper indexing of official records according to various legislated codes; researching documents and codes applicable to official records indexing; utilizing codes and sequences data in a computerized system of specialized abbreviations; machine key-verifies the work of other persons engaged in recording and indexing documents; processes error corrections and maintains index volumes on current basis; checks computer output for accuracy and completeness.

**Recordable Documents Specialist II:** All of the duties listed above, plus: trains and assists in the supervision and evaluation of subordinates involved in the preparation, processing, recording or indexing of recordable documents.

**Recordable Documents Specialist III:** All of the duties listed above, plus: trains, supervises and evaluates subordinates pertaining to the preparation, processing and indexing of recordable documents, utilizing the appropriate software and hardware to ensure proper recording and abstracting decisions are made; performs the more complex recordable documents specialist work; performs quality assurance work and initiates corrective action when errors are discovered; provides authoritative interpretations of state laws, ordinances and policies related to the recording of documents; coordinates work to ensure that legal deadlines are met.

## **MINIMUM QUALIFICATIONS:**

Knowledge Level:    T = Thorough;            G = General;            -- = Not Applicable

Classification Level:    I        = Recordable Documents Specialist I  
                                  II        = Recordable Documents Specialist II  
                                  III       = Recordable Documents Specialist III

### **Knowledge of:**

<b><u>I</u></b>	<b><u>II</u></b>	<b><u>III</u></b>	
G	T	T	Legal terminology, procedures and forms necessary to process recordable documents.

G	T	T	General principles and practices pertaining to real estate title and encumbrances (loans and mortgages on real property).
G	T	T	Functions, policies and procedures of a County Recorder's Office.
G	T	T	Laws, regulations and codes governing recordability and indexing of a wide variety of documents.
G	T	T	Legal and administrative recording requirements of official records documents.
G	T	T	Legal and contractual procedures and transactions.

**Knowledge of:**

G	T	T	Knowledge of recording methods, including electronic/computerized data entry, storage, retrieval and documents production techniques.
--	--	G	Principles of supervision and training.
--	--	T	Workflow, work schedules and work priorities.

**Skills and Abilities to:**

The following skills and abilities apply to all Recordable Documents Specialist classes:

- Learn and apply laws, policies and procedures related to the legal recording of documents in a California County Recorders office.
- Independently use legal books, indices, and other resources to determine the requirements for recording documents.
- Learn and apply laws, policies and procedures related to the legal recording of documents in a California County Recorders office.
- Research and interpret a wide variety of documents submitted by the public using guidelines set by the State of California and local ordinances (i.e., California Administrative, Government, Business & Professions, Civil codes; Code of Civil Procedures; Commercial, Corporation, Education, Evidence, Family, Fish and Game, Health & Safety, Labor, Penal, Probate, Street & Highway, Revenue & Taxation, legislative codes, etc.).
- Determine the type of recordable document submitted, determine and/or calculate recording fees.
- Review legal documents and records for accuracy, completeness and conformance with prescribed legal requirements.
- Maintain thorough and accurate indexing of all recordable documents.
- Meet strict legal deadlines.
- Work within established formats, priorities and perform work in required sequences.
- Perform work by operating standard office equipment, including but not limited to, computers, printers, calculators, copy and fax machines, and automated telephone equipment.
- Communicate effectively, orally and in writing.
- Maintain thorough and accurate indexing of all recordable documents.
- Establish and maintain cooperative working relations with those contacted during the course of work.

**Recordable Documents Specialist II (in addition to the above):**

- Perform quality review of documents to ensure document meets all applicable mandated requirements.
- Communicate all legal recording requirements to title company representatives, attorneys, corporate representatives and the general public.
- Train subordinates in indexing and verifying or recording legal, realty, vital records and other documents.
- Use the Recorder's computerized recording system, Grantor/Grantee index and the Assessor's property information system to perform work.
- Determine the acceptability of the notarized portion of a document including all out-of-state notarizations.
- Recognize and determine the quality of a document for photographic reproduction.

Recordable Documents Specialist III (in addition to the above):

- Provide training, supervision and quality control oversight to subordinate staff performing legal document recording and indexing work.
- Perform the most difficult document research, verification, indexing and recording work.
- Interpret and explain complex regulations, policies and procedures.
- Coordinate hardware, software and personnel for optimal utilization of technical and human resources.
- Ensure that supervised work meets prescribed legal deadlines and quality standards.
- Effectively handle the most sensitive and complex recording and indexing issues.
- Convey comprehensive directions through oral and written communication.

EDUCATION/EXPERIENCE:

Education, training, and/or experience, which would likely demonstrate the knowledge and/or skills stated above. Examples of such education/experience are:

Recordable Documents Specialist I:

1. Completion of an approved or accredited paralegal program; OR,
2. One (1) year of full-time experience in a California County Recorders Office performing legal document processing, recording or indexing work which included receiving, reviewing, making determinations on the legal recordability of documents that establish a public record of ownership of real property within the county and the encumbrances (loans and mortgages on real property), as well as qualifying transactions in personal property, and for recording and indexing these and a wide variety of legal documents affecting real property parcel, and property tax information; OR,
3. Two (2) years of full-time experience in a public or private agency performing title insurance, financial or escrow work which included responsibility for interpreting and preparing recordable documents; AND, completion of a course related to recordable document processing from an accredited college, or recognized program; OR,
4. Two (2) years of full-time experience abstracting information from real estate documents for preparation of a real estate index of recorded documents in a mortgage or real estate company, title company/plant, or financial institution.

Recordable Documents Specialist II:

1. Two (2) years of experience as a Recordable Documents Specialist I in the County of San Diego; OR,
2. Three (3) years of full-time experience in a California County Recorder's Office performing legal document processing, recording or indexing work which included receiving, reviewing, making determinations on the legal recordability of documents that establish a public record of ownership of real property within the county and the encumbrances (loans and mortgages on real property), as well as qualifying transactions in personal property, and recording and indexing these and a wide variety of legal documents affecting real property parcel, and property tax information.

**Recordable Documents Specialist III:**

1. Three (3) years of experience as a Recordable Document Specialist II in the County of San Diego; OR,
2. Five (5) years of experience with a public or private agency processing and dealing with mortgage or title documents which are later recorded in a California County Recorder, which must have included three (3) years of experience supervising the work of others.

**SPECIAL NOTES, LICENSES, OR REQUIREMENTS:**

**Certificate:**

An original, unaltered, typing certificate (no photocopies) for at least 30 WPM with a maximum of 5 errors. The typing test must be for at least five minutes with 2 gross words penalty for each error (in accordance with International Typing Contest Rules), and the certificate must be no more than two (2) years old. The certificate must state the gross words per minute attained and the number of errors. Increased speed and accuracy of 50 wpm may be required for document indexing.

**Working Conditions:**

The County Recorder is required by law to record all documents that are presented for recording that day, regardless of volume. This work is subject to strict legal criteria and quality review standards. Mandatory overtime is frequently required with little or no prior notice.

**Physical Requirements:**

Strenuous physical labor on a continuous basis, including lifting up to 50 pounds.

**Probationary Period:**

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).